



Documents Needed for Planning

Please upload the documents below **IN ADVANCE** of your meeting using this secure link: [Secure Document Upload](#). You may also fax or mail them to us in prior to your appointment. All information will be treated **CONFIDENTIALLY**.

Most Recent Payroll Stub(s), LES (ELS), Earnings/Annuity Statements

- Self
- Spouse

Current Social Security Statement(s)

- Self (www.ssa.gov)
- Spouse (www.ssa.gov)

Income Tax Returns (past two (2) years)

- Self
- Spouse (if filing separately)

Divorce Decree(s), Separation Agreement(s), and Prenuptial Agreement(s)

- Self
- Spouse

Company Benefits (Non Federal)

- Retirement
- Insurance
- Pension Estimates

Insurance(s), Annuity Contracts, and Annual Statements

- Life
- Disability
- Group Insurance
- Annuities (Variable, Fixed, and Index)
- Long-Term Care Plans

Savings and Investment Statements

(current statements preferred)

- Thrift Savings Plan (tsp.gov)
- IRAs / Roth IRAs
- Mutual Fund / Savings Accounts/CD's
- Brokerage Accounts
- 401(k) / Keogh / SEP Accounts
- 403(b) (Tax Sheltered Annuities)
- Pension Plans / Profit Sharing
- Voluntary Contribution Plan (CSRS ONLY)
- Other

Other

- Mortgage Statement(s) to include:
 - Original Balance
 - Current Balance
 - Interest Rate
 - Term
 - Payment

*****Be sure to have the following items available to you during your meeting:**

- Driver's License(s)
- VRS Member Benefit Profile (Available on-line)
- Federal Employee Personal Statement of Benefits (EBIS) (Available on-line from OPM)